

ATTACHMENT A
SOLICITATION NO. 8070000051

This Solicitation is a Contract Document and is a request for proposal in connection with the Contract awarded by the Office of Management and Enterprise Services as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other Contract Document.

PURPOSE

The Contract is awarded on behalf of the Oklahoma Healthcare Authority (OHCA) for the services of a vendor to manage its existing Third-Party Liability (TPL) program in accordance with 42 CRF 433.135 et. seq. and this RFP

1. Contract Term and Renewal Options

The initial Contract term, which begins on the effective date of the Contract through June 30, 2022 with five (5) one (1) year options to renew the Contract.

2. Obligations of Supplier

Supplier shall:

- a. Take reasonable measures to determine the legal liabilities of third parties for medical costs incurred by OHCA.
 - i. Engage in data exchange with carriers and other identified third parties specifically necessary to facilitate recovery of third-party resources in accordance with the standards of confidentiality imposed by § 1902(a)(7) of the Social Security Act, for the purposes of TPL recovery. The vendor and subcontractors are bound by the Regulations safeguarding information on applicants and recipients found at 42 C.F.R., Part 431, Subpart F and 45 C.F.R., Part 164.
 - ii. Utilize exchanged data to obtain insurance information from the liable third party.
 - iii. Maintain the insurance information on vendor's database.
 - iv. Transfer verified information to OHCA in the required format at time intervals agreed upon by the parties, but in no event less frequently than once per week.
 - v. Report to OHCA any liable third party who refuses to cooperate with the reasonable actions taken by the vendor for TPL identification and recovery for future action by OHCA.
- b. Submit for incorporation into OHCA's eligibility file and third-party database all identified legally liable third-party resources.

- i. Store third-party information gathered from data exchanges and post payment health insurance activities on vendor's database.
 - ii. Verify policy information obtained from third-party carriers.
 - iii. On at least a monthly basis obtain the Medicaid Eligibility File from OHCA for data match purposes to maximize the identification of TPL for recovery and cost avoidance.
- c. Carry out post payment recovery activities in adherence to OHCA's right to recovery statute 63 O.S. 5051.2 and develop a recovery process consistent with federal regulations and OHCA policies. Create and maintain a computer database, compatible with OHCA format, and record all third-party resource and recovery data.
 - i. Use OHCA's most recent eligibility file to carry out its post payment recovery activities and duties under this contract. Use the most recent eligibility file to ensure that excluded major programs will not be used for data matches or for pursuing recovery.
- d. Enter into data exchange agreements with third party payers pursuant to 63 O.S. 5051.5 and relevant federal regulations for the purpose of identifying and verifying third-party liability coverage, including all major Oklahoma medical carriers and identify monthly, any third-party payers who refuse to enter into data exchange agreements, or who unreasonably delay entering into such agreements.
- e. Record post payment activity including, but not limited to, OHCA-paid claim information, identification of the insurance carrier, insurance carrier reimbursement amounts, insurance carrier denial amounts, and insurance carrier reasons for denial.
- f. Coordinate benefits when more than one third party resource is available.
- g. The Contractor shall provide:
 - All staff necessary to perform the services required under this RFP.
 - The following Key Personnel:
 - i. A Project Director (PD) with day-to-day responsibility for the services required under this RFP. The Project Director does not have to be permanently located in Oklahoma City but must be regularly present in Oklahoma City during implementation of this program
 - ii. A Project Manager An information technology lead responsible for the Contractor's access to the MMIS and/or establishing and maintaining electronic file transfer with OHCA.
 - iii. A trainer to learn OHCA policy and rules, and provide training to Contractor staff to be kept current on OHCA policy and rules; and,
 - iv. A quality assurance officer (QAO).
- h. Contractor shall not change the designation of the Key Personnel without prior approval through formal correspondence from OHCA. (The Contractor may use its expertise and experience to propose other types of staff – OHCA at its sole discretion may decide to accept a proposed staff category.)
- i. Table 2 Contractor Key Personnel Roles and Responsibilities describes the key project positions, their corresponding roles project responsibilities, and minimum qualifications for each. Other positions may be proposed at the Contractor's discretion.

- j. The Contractor shall submit:
 - i. Weekly Implementation Report:
During Contract Development, OHCA and Contractor shall agree on any revisions to the Milestone Schedule shown as Form 5, major implementation risks outside Contractor's control, and the critical path for meeting the implementation schedule. Contractor shall submit a weekly implementation report in a mutually agreeable format identifying any changes from the original milestone dates and the reasons for the change and the status of the major implementation risks particularly those affecting the critical path.
Weekly Cost Avoidance file of policy additions, changes, and terminations to support cost avoidance effort report.
 - ii. Deliver the following to support third party recovery efforts:
 - 1. Weekly Cash Control
 - 2. Recovery Reports
 - 3. Monthly invoice backup documentation
 - iii. Submit Quarterly Report,
 - iv. Submit an Annual Report
 - v. Submit a Monthly Refund Report
 - vi. Submit a Monthly Invoice Report

3. **Obligations of Agency**

Agency shall:

- a. Provide the Contractor access to the MMIS for its employees and/or cooperate with the Contractor to establish an electronic file transfer process.
- b. Provide information on OHCA policy, eligibility, and other information requested by the Contractor.
- c. Review the criteria and protocols proposed by the Contractor for any conflict with OHCA standards or policies.
- d. Perform additional activities proposed by the Contractor and acceptable to OHCA; and,
- e. Provide up to 100 hours of training to Contractor's Project Manager and staff before operations start-up and up to 3 hours per month of updates thereafter.
- f. The OHCA Contract team will coordinate the overall project management responsibilities including availability of OHCA resources as required to support the Contract. During the entire lifecycle of the Contract, the OHCA will:
 - i. Define the goals and objectives of the Contract and services throughout implementation and ongoing operations.
 - ii. Communicate the goals, objectives, and ongoing status of the Contract to all stakeholders.
 - iii. Work with stakeholders to identify and monitor project and program risk and appropriate mitigation issues related to the Contract.
 - iv. Monitor the project management approach that will govern the Contract.
 - v. Review the draft deliverables and final deliverables developed by the Contractor and provide feedback, request changes, and provide final

- review until the OHCA is satisfied with the resulting deliverable.
- vi. Review and approve or reject final deliverables developed and revised by the Contractor; and,
 - vii. Provide access to OHCA management and Subject Matter Experts (SMEs) for the approval of the deliverables required to meet the goals and objectives of the project.